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Elizabeth L. Harvard

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**Motivations for Charitable Giving Among Generations X and Y:  
Applying an Extended Theory of Planned Behavior to Independent School Alumni**

**Elizabeth L. Harvard**

**University of Richmond**

### **Abstract**

Generational shifts in wealth, perspective and influence are forcing private schools, and colleges and universities to grapple with how to establish productive alumni relationships for long-term financial sustainability. Empirical data about Generation X and Y's motivations to donate is limited and not easily accessible. An extended Theory of Planned Behavior (TPB) was used to measure the influence of attitude, perceived behavioral control, social norms, and past behavior on intention to donate among Gen X and Y alumni of private schools in Virginia. Respondents (N=504) were born between 1965-1980 and 1981-1995 respectively. The results demonstrated that attitude, perceived behavioral control, moral norm and past behavior are strong predictors of alumni intentions to donate to their alma mater, while subjective and descriptive norms were weakly correlated to intention; however, among Generation Y, the greater the perception that other alumni give, the stronger was their intention to donate. Generation was found to be a moderator of perceived behavioral control, past behavior and the descriptive norm pertaining to alumni behavior. These results further affirm the effectiveness of an extended TPB as a predictive model for charitable giving and other pro-social behaviors.

*Keywords* Generation, TPB, charitable giving, motivations, nonprofit funding, private schools

## **Motivations for Charitable Giving Among Generations X and Y:**

### **Applying an Extended Theory of Planned Behavior to Independent School Alumni**

Generational shifts are rapidly unfolding, leaving many education development offices uncertain how to respond as they straddle the Baby Boomer Generation and Generations X and Y (herein Gens X and Y). Solutions are often piecemeal, coming in the form of hiring a younger person into the organization, adding a social media component to the program and grappling with data analytics. Limited time and resources, traditional views of fundraising, and the known value of mature donor relationships diminish opportunities for longer-term planning with a strategic focus on Generations X and Y. “While this may seem like a problem that schools can address at some point in the distant future, it actually is one of their most urgent strategic imperatives” (Linder, 2017, p. 7). A lack of accessible empirical data further exacerbates the challenges of conducting effective strategic planning and program integration within the field of development. The current study focused on Gen X and Y alumnae/i (herein alumni) motivations for charitable giving to their alma mater, asking two primary research questions: *Among Generations X and Y, what factors motivate intention to donate to one’s alma mater? Does the influence of motivational factors change based on Generation?*

### **Private Education**

Charity Navigator reported that the second largest recipient of charitable donations in the United States is the education sector, which received just under \$60 billion in donations in 2017. The sector is broad and includes higher education, elementary and secondary education, and special education programs. According to the National Center for Education Statistics (2017) private schools survey, there are 34,576 private schools in the U.S. with enrollments of 5.9 million students representing just over 10% of all elementary and secondary school students nationwide.

Private/independent schools are nongovernment-funded and-mandated institutions, classified under the IRS tax code as 501(c)3 organizations, which allows them to receive charitable donations and the donors to receive a tax deduction for their gifts. The Council for American Private Education (2018) reported that 95.8% of 2016 graduates who attended only private school persisted to attend college, and the Center on Philanthropy at Indiana University (Campbell & Co, p.19) reported that one's level of education is positively correlated to charitable giving and to giving a higher proportion of income.

**Private education topology.** According to the National Center for Education Statistics, the topology of private elementary and secondary schools includes Catholic and other religious schools, non-sectarian schools, special education, and special focus. It does not include home schools or public charter schools (Private School Universe Survey, Table 317.40). There are more private colleges and universities than public colleges and universities in the U.S. and many public institutions of higher education have also established one or more private foundations for the purpose of receiving charitable donations to supplement government and tuition revenues. The current study may have useful application for higher education administrators as well as independent schools.

**Private school funding model.** While public education is funded with tax dollars, which make it free for and available to all students and their families, the funding model for private education generally includes tuition income, charitable donations, and other revenue-generating activities such as summer camps. Each component is crucial, and private education institutions strive constantly to balance expenses, the cost of tuition, and charitable giving. Charitable donations can be directed to support the annual operating budget and are typically raised under an annual fund campaign that happens every year and uses a mix of media. Donations to the

annual fund may be unrestricted or restricted for specific purposes such as financial aid, faculty development, and curriculum innovation. “When it comes to donating money to their college alma maters, more alumni are attaching strings to their gifts” (Weil, 2018, p.1). Building renovations, new construction, and other capital projects require additional charitable donations designated for the capital initiative at hand and are raised under capital campaigns, which have their own budget, plan, and timeline. Finally, donors may elect to give to endowment, which are gifts made in perpetuity to be invested for the future, where only a small percentage of the interest earned e.g. 4 ½% of a three-year rolling average, is expended each year; the annual payout offsets some of the annual operating expenses thus freeing up unrestricted funds for other uses. Often endowment gifts come with donor restrictions which limit how the funds can be used by the institution. Some typical areas of restriction include financial aid, student-based research, academic and athletic departments, landscaping and facilities maintenance. When a donor’s intention cannot be met in a given year, funds cannot be dispersed for other uses in that year, and in situations, usually long after the death of the donor, where their designated program has been discontinued, the process for an institution to eliminate a legal gift restriction is complex and delicate, requiring final approval by the state Attorney General. (Jagodowski, 2018, pp.1-16)

### **Charitable Giving in the U.S.**

Charity Navigator reported that total 2017 charitable contributions in the U.S. were \$410 billion, of which 80% came from individuals through outright gifts, self-directed funds, and bequests. Fourteen percent, or \$58.9 billion, was directed to education charities, underscoring the necessity to maintain productive alumni relationships. It noted that “giving has increased in current dollars every year since 1977, with the exception of three years that saw declines” (p.1). Charitable giving as a percentage of GDP remains steady at 2.1.

**Charity and generations.** The primary benefactors of U.S. charities in the late 20<sup>th</sup> and early 21<sup>st</sup> centuries have been members of the Silent and Greatest Generations, who were born before 1944, and the Baby Boomer Generation that followed; Boomers are expected to maintain the largest share of wealth until at least 2030 (Sigalos,2018). Today, however, Deloitte Consulting states that 51% of political and economic leadership positions worldwide are held by members of Gen X, who by 2030, are expected to hold 31% of America’s wealth. Although it is a smaller generation of 64 million people, Gen X are coming into their own financially and serving as a bridge between Boomers and Gen Y. It is important for charities to recognize Gen X’s status in part because of the wealth transfer that is taking place from Matures and Boomers to younger generations. With a projected wealth transfer of \$68 trillion over the next 25 years, Goldseker and Moody report that Gens X and Y are focused on impact and “want to reshape philanthropy in ways they believe can finally lead to meaningful progress on our toughest challenges” (p.2). They also note that Gens X and Y expect nonprofits to demonstrate impact with measurable outcomes, “clearer evidence that results were tied to their particular contribution,” and other evidence of tangible change or added benefit (p.4).

**Table 1**

<i><b>Generation</b></i>	<i><b>Birth Year</b></i>	<i><b>Total # Births</b></i>	<i><b>% Total 2015 Giving</b></i>	<i><b>US Net Wealth 120tn by 2030</b></i>
Silent	1928-1945	47M	29.2%	.09%
Baby Boomers	1946-1964	76M	40.4%	45%
Gen X	1965-1980	55M	15.5%	31%
Gen Y	1981-1997	66M	8.3%	16%

(Pew Research Center,2015, p.2; Joslyn, 2016, pp.4-5; Srinivas & Goradia, 2017, Figure 1, p.3)

**Generations and age.** Pew Research characterizes age as denoting “two important characteristics about an individual: their place in the life cycle—whether young adult, middle aged parent, or retiree—and their membership in a cohort of individuals who were born at a similar time” (p.1). There are numerous lenses on age including social age, cognitive age, subjective age, personal age, and “other” perceived age, which are used, among other purposes, to guide marketing strategies. As age became multi-faceted, it invited further market segmentation but also multi-generational strategies that engage commonalities between generations. “Generations are one way to group age cohorts...A generation typically refers to groups of people born over a 15-20-year span” (Pew, p.1).

Factors other than age comprise generations. Racial and ethnic compositions of generational cohorts change from one generation to the next, guaranteeing an ongoing change in future generations e.g. 57% of Gen Y in the U.S. are non-Hispanic whites versus 72% of Boomers. Life-shaping behaviors such as marriage, children, and church attendance differ across generations as well, thus altering generations’ beliefs and attitudes. Studies have found that Gens X and Y greatly value diversity and equity. Finally, major events, such as natural disasters, war, tectonic economic changes are period effects that leave a mark on a whole generation.

Generation and age shape individual and collective attitudes, behaviors, and perceptions of control. The goal of the current study was to ascertain how Gen X and Y’s attitudes, behaviors and control may predict their propensity to make charitable donations, and the researcher applied the Theory of Planned Behavior to Gen X and Y alumni of independent schools as its construct. (Pew Research, p.3-8)



**Summary**

The current study takes a step toward determining the factors that motivate charitable giving among Gens X and Y by surveying 4354 independent school alumni born between 1965-1995. The study utilized an extended Theory of Planned Behavior for its flexibility and proven success as a predictive model. The Theory (Smith & McSweeney, 2006) proposes that human behavior is guided by three intersecting considerations including attitudes, normative beliefs and control beliefs which work together to predict an individual's intention to act. Intention is thought to be the central factor that leads to actual behavior (p.365). By analyzing motivations for giving among Gen X and Y, private schools and colleges can design targeted communication, engagement and fundraising strategies to inspire younger prospects for the benefit of long-term financial stability.

## **Literature Review**

The current study seeks to understand the factors that motivate Gens X and Y to make monetary donations to their independent school alma maters in the United States. It explores the social and psychological aspects of motivation with a focus on intention to donate or having a readiness to act. Motivations of such pro-social and charitable behaviors as preventing drug use, quitting smoking, volunteering, donating blood, and emergency response dominate the literature, while the psychological and social motivations to make monetary donations have been neglected until more recently (Smith & McSweeney, 2006, pp.365-366). This paper develops connections between economic, management, psychology and sociology literature around attitude and belief-based motivations for charitable giving.

### **Charitable Giving**

Merriam-Webster's Dictionary (1999) defines charitable as "full of love for and goodwill toward others", "liberal in benefactions to the needy", and "merciful or kind in judging others".

"Charitable giving constitutes the donation of personal funds or property to a charity organization...Donors signal support and belief in a charity and its mission when they 'vote' with their dollars" (Yao, p. 2). Despite the ideal definition of charitable, individuals make decisions to donate money for a host of different reasons and personal motivations that can be broadly categorized as self-interested, or for personal gain, and altruistic, or care for the welfare of others. Andreoni's (1989) model shows how charitable giving is an impurely altruistic exercise that generates both a public and private good (pp.1456-1457). Sanders and Tamma (2015, p.1) further refined the range of motivations as purely altruistic, impurely altruistic, or feeling good knowing one is doing something to support a social good, and not at all altruistic, in other words, driven completely by self-interest, and often highly visible. The Stanford

Encyclopedia of Philosophy (2017) notes that “Behavior is normally described as altruistic when it is motivated by a desire to benefit someone other than oneself for that person’s sake. The term is used as the contrary of “self-interested” or “selfish” or “egoistic”—words applied to behavior that is motivated solely by the desire to benefit oneself” (Altruism, 2016).

**Personal gain.** Self-interest incorporates everything from receiving material benefits such as tax savings, business advantages, gifts, and board membership to gaining psychological benefits such as feeling good about donating, avoiding guilt or judgment, earning social acceptance, and gaining prestige. Economists have long referred to the *warm glow* or *joy of giving* that brings a sense of satisfaction and peace; psychologists label this *empathetic joy* (Sargeant & Woodliffe, pp.292-294). The field of neuroscience, more recently, has viewed donors’ brains actively generating the reward feeling when the subjects make a charitable donation (Karns, 2018). Konrath and Handy (2017, p.351) crystalized charitable motivations in terms of “benefits (from economics) that the donor receives in exchange for making the donation, and that these benefits can be categorized as self-or other-focused (from psychology).”

The influence of personal values on the decision to donate is higher in people with stronger altruistic, pro-social motivations (Bekkers & Wiepking, 2007, pp.35-36). Altruism can be complicated by the degree to which a donor views his donation as directly meeting a need. Since altruism is purely about meeting the needs of others, then if someone else appears to be meeting the need, a donor may choose to give less or not at all. Vesterlund (2011, p.568) notes that “an increase in the contribution of others is expected to decrease an individual’s contribution when the benefit of giving is public and to cause no change if the benefit of giving is private.” In contrast, Bekkers & Wiepking (2007, p.29) noted that donations increase when others of high standing in the community make donations by establishing the charity’s trustworthiness. This is

not the case when the community member is of lower social status. Similarly, they reported that an individual will give more when peers or other people who are important to the donor increase their donations.

**Costs and benefits.** Economists recognize that some monetary donations cost more than others depending on the vehicle used to make the gift. For example, donating appreciated stock may provide savings and flexibility to the donor because of the dual tax benefits associated with it. Some costs of donating include having less to spend on oneself or other charities, decreased feeling of financial security, decreased output or inheritance for children and grandchildren, and more solicitations from other organizations. As reported by Bekkers and Wiepking (2007, p.23) “econometric studies suggest that donors weigh the needs of distant others against the future needs of their own children.” This idea of costs and benefits beyond and including financial ones underscores the complex interplay of psychological and social motivations behind decisions to donate money to charity (Vesterlund, 2006, p. 569-573).

### **Attitude and Belief-Based Motivations for Charitable Giving**

The Theory of Planned Behavior (TPB) has been used to empirically demonstrate that attitudes, behavioral beliefs and control beliefs motivate behavioral intentions, and that “intention is the proximal determinant of behavior” (Knowles, Hyde, White, 2015, p.2097). As noted by Smith & McSweeney (2007, p.365), TPB has been widely used by behavioral scientists because of its predictive ability. TPB not only explains and directs intention but also clarifies the underlying reasons and beliefs about a certain action. “The central premise of the theory is that behavioral decisions are not made spontaneously but are the result of a reasoned process in which behavior is influenced, albeit indirectly, by attitudes, norms, and perceptions of control over the behavior” (p.365). Norms include subjective norms or social acceptability, descriptive norms or perceptions

of what others do, and moral norm or one's personal sense of duty and responsibility to others. (Knowles & Hyde and White, 2012, p.2098).

**Attitude, subjective norm, and perceived behavioral control.** “Recent meta-analyses using TPB revealed that on average, attitude, subjective norms and perceived behavioral control account for 40-50% of the variance in intentions” (Smith & McSweeney, 2007, p.365). TPB has shown that a positive attitude toward a behavior leads to a greater intention to engage in the behavior. It has demonstrated that the more control a person believes they have over an action, the stronger their intention to act will be; this concept is termed perceived behavioral control. Finally, TPB has shown that to a lesser extent, intention is also motivated by subjective norms such as whether important others will approve of the behavior. (p.366)

**Introduction of past behavior, and moral and descriptive norms.** With Azjen's support and in order to improve upon its reliability as a predictor of behavior, scholars have extended the TPB to include other factors, such as past behavior, that may influence intention. Smith & McSweeney (2007) included past behavior in their study, which was the first application of TPB to charitable giving. The scholars also measured subjective, descriptive and moral norms to distinguish the influence of each on intention to donate. Deconstructing the normative factors and measuring them simultaneously allowed the researchers to ascertain the relative impact of subjective, descriptive and moral norms on intention. Descriptive norms are what an individual believes others are doing, and moral norm is an individual's personal code of ethics and self-identity. Their findings substantiated the influence of the original TPB factors of attitude, subjective norm and perceived behavioral control on intention to donate and uncovered the significant influences of moral norm and past behavior on intention to donate. “Moral norms appear particularly useful in the prediction of pro-social behavior or behavior with a moral

component” (p.367). Subjective norm remained the weaker predictor of intention. (pp.366-368, 373-378)

**Validity of norms.** Knowles et al. (2017, p.2103-2105) found that attitude and perceived behavioral control (PBC) were most strongly correlated to intention to donate. Together with moral norm and past behavior, these predictors accounted for 61% of the variance in young people’s intentions to donate in the future. Their study did not include descriptive norm measures, while results of subjective norm as a predictor of intention were weak. Subjective and descriptive norms have consistently been weak predictors of intention to donate, leading some scholars to argue against including normative behaviors at all in TPB (Smith & McSweeney, p.366). However, I believe that the identification of moral norm’s influence adds validity to including normative beliefs. Scholars differ over whether normative beliefs are themselves a weaker influence, or if the constructs don’t adequately capture their complexity. Sargeant and Woodliffe (2007, p.295) contend that the role of subjective norm is more relevant to educational institutions and local arts organizations than to national charities, which raises its importance to the present study.

**Moral norms.** By separately measuring moral norm, scholars have uncovered a significant new motivation of intention to donate. In another study, Campbell & Co (2008, p.6) found a positive moderate correlation between regular church attendance and charitable giving. Wallis (2012, p.3) spoke of nine adjectives that Americans use to describe a moral person. These are kind, caring, compassionate, helpful, friendly, fair, hard-working, generous and honest.” When one or more of these words were used in fundraising to women, women’s giving increased by 10%. Men preferred the words strong, loyal and responsible to describe a moral person.

**Past behavior.** Past behavior has also been identified as a predictor of intention to donate, which may stem from the establishment of habit or positive attitude toward the behavior, or by increasing perceived behavioral control. “Past behavior is one of the most important predictors of pro-social behavior and should be included in TPB Extended” (Sutton 1994 as cited by Smith & McSweeney, 2007). Sutton proclaimed past behavior to be a stronger predictor than the TPB measures. Future research into the role and reasons for past behavior in determining future behavior would be useful. Past behavior was also pinpointed to be the strongest predictor of intention to donate to disaster relief efforts (Oosterhof, Heuvelman, Peters, 2009). Media coverage played a critical role in building campaign awareness, which Oosterhof et al. attested “affected all other factors including intention to donate to a relief campaign” (Abstract).

**TPB applied to product marketing.** TPB has been applied beyond pro-social and health contexts to consumption behaviors. A recent study of decision-making for the purchase of a brand of soft drink (Smith and Manstead, pp.312-314) aligned in many ways to the charitable giving findings by Smith and McSweeney, and Knowles et al. Attitude and past behavior influenced intentions to purchase, and intentions were predictive of the behavior, while social norms had less influence. Likewise, according to Goldseker (2009, p.117) self-identify, which this paper associates with moral norms, and subjective norm in terms of belonging, was a strong motivator of intention and action as well. Self-identity is particularly relevant to this study of younger generations because of the multiple identities they hold, not singular ones like those of older generations.

## **Generations**

Generations of people live through unique social, cultural, economic and political circumstances that shape and distinguish one generation from another. Campbell & Co. (2008, p.2) identifies

the current four adult generations as Veterans/Greatest (1925-1944), Baby Boomers (1945-1964), Generation X (1965-1981) and Gen Y/Millennials (1982-2000). Given the significant impact that Generations X and Y are having on the economy, politics and social norms, and the vast wealth that is and will continue to transfer to them, it is critical for nonprofit organizations to grow in their understanding of the attitudes, beliefs, and behaviors of Generations X and Y (Harnett & Matan, 2004, p.1). Wong et al (2013, pp.878, 884) argued that age, not generation, is the primary factor that differentiates behavior when comparing generations. While their study found some support for age, Wong et al. also found clear generational differences between Boomers and Gen Y. My research anticipates that there will be similarities between workplace attitudes and values, and volunteer attitudes and values, which provide a starting point for testing their motivations to make a charitable donation.

**Gen X.** At the time of this research, members of Gen X were aged 39-54. This group experienced a youth where the divorce rate was high, dual working parents was the norm and children had to fend for themselves after school; this was when “Latchkey Kids” was termed. This generation tends to be independent, self-sufficient, and fiscally conservative. Gen X are comfortable with diversity, value equality, and are skeptical of advertising. They are also immune to authority. A major energy crisis, the fall of the Berlin Wall, Watergate, environmental disasters and war images were in the cultural and political background, resulting in a generation both cynical and pessimistic. Unlike older generations, Gen X values personal goals over work goals. (Kupperschmidt, 2006, p.3; Harnett & Matan, 2014, p.2; Acar, p.12-13; Wong et al. 2008, p.880)

Martin (2016) reminds us that Gen X has influence over older and younger generations. Many are starting their own businesses and developing new technologies. Microsoft was



established during this time nurturing a generation comfortable with technology. Growing up in the advent of digital technology naturally prepared them to bridge understanding of technology among older generations. “At work, X’ers are taking management roles and mentoring their younger coworkers”, which is a role that private schools may consider incorporating into their volunteer and fundraising programs (p.2). Finally, “X-ers like Elon Musk (Tesla Motors, SpaceX and Solar City) have created innovative startups whose explicit aim was to make the world a better place” (p.2). The potential for Gen X to bring innovation and impact to schools and the nonprofit sector at large is significant, but it will require open dialogue between Gen X alumni and their institutions.

In the workforce, Gen X are motivated by opportunities to influence, control their destiny and achieve recognition. While Wong et al. (2008) attribute this to age, not generation, Chaney et al. (2017) suggest that for marketing purposes, it is most effective to develop strategies that consider both age and generation. According to Danna (2018) early Gen X careers were fraught with layoffs and mergers furthering an attitude of distrust of organizations. Employer loyalty declined during this time while employee self-reliance and independence increased. Gen X appreciate ongoing feedback whether delivered in person or informally through web-based channels (p.2). Gen X value hands-on experiences and engagement and are spearheading alternative ways of giving and expressing altruism through social entrepreneurship and for-profit investment choices. DiMento (2017) describes Gen X as being an earnest cohort that thrives on open, candid conversations with volunteer organizations and is willing to engage the nonprofit’s point of view (p.3). Acar (2014) notes that Gen X bring technological competency, an ability to multi-task and twerk on their own, but that a positive attitude toward the organization will decline if it fails to embrace technology and professionalism (p.13). The current study

hypothesized (H4) that approval would more strongly predict intention to donate among Generation X.

**Gen Y.** This generation, who were aged 29-38 at the time of this study, grew up in a rapidly changing, fast-paced world stemming from dramatic and continuous technological advancements. Technology is second nature to Gen Y, who maintain 24/7 connection to their devices. Their youth was in an era of increased violence, environmental awareness, and cultural diversity. Culturally, it was a child-centric time when parents were overly protective and afforded their children every opportunity for success; this resulted in busy, intensely structured lives and high aspirations among Gen Y. Gen Y are impulsive, highly educated, and well-traveled. They are hopeful, socially conscious and longing to make the world a better place. Chaney ascribes three personality types to Gen Y, each of which lends insight into the emotional needs that this generation may seek to have met when working with a charity. Types include those seeking personal relationships, those seeking quick solutions to problems, and those seeking parental guidance and support. (Harnett, p. 2; Kupperschmidt, p. 1; Chaney, p.183)

Gen Y define themselves with multiple identities, which makes the generation more difficult to segment but opens the door to various identities on which to engage their interest in a charity. Gen Y prefers collaboration and teamwork and favors cultural diversity. This generation seeks a balanced lifestyle and meaningful and useful work and has great confidence in their abilities. Gen Y is considered both narcissistic and anxious, and open-minded and ambitious. It has been described both as a Generation Me, because of the sense entitlement and self-assurance as well as the reciprocity many expect for charitable effort or donations, and as a Generation We, which is altruistic, eager to do good and to help solve the world's problems. According to Gorczyca, "Millennials prefer to donate to a cause, not an organization," and believe that sharing

their time and knowledge, and spreading the word about a cause is more important than their making a monetary gift (p.425). Harnett & Matan (2014, p.8-9) found that peer solicitations, and peer support for and involvement with a charity/cause increase Gen Y's motivation to donate time and money. This study hypothesized (H5) that descriptive norms, or perceptions of what others are doing, would more strongly motivate intention in Gen Y than in Gen X.

(Kupperschmidt, p.1; Gorczyca, pp.417-425)

In the workplace, Gen Y values achievement. Modeling behavior the institution wants to develop in Gen Y and being clear about expectations are important relational factors. One study found that Gen Y are more intrinsically motivated when it comes to helping others and donating to a charity; intrinsic motivation results from the personal pleasure and enjoyment that come from taking the action. Technology has heightened Gen Y's yearning for personal connections. While this cohort uses technology to learn about a nonprofit, it looks for more personalized avenues to connect around serving, networking, and addressing an organization's challenges. There is evidence that Gen Y seeks reciprocal personal relationships with charities in which they donate time, intellectual capital and/or money in return for mentoring, coaching and skills development. Traditional engagement models will not be satisfactory or inspiring to this generation. As volunteers and staff members, this generation brings openness, knowledge of virtual tools, an interest in collaboration and technological know-how to the workplace; however, if an organization fails to utilize cutting-edge technology or live up to Gen Y's high expectation, Gen Y will rapidly lose interest and move on. (Gorczyca & Hartman, 2017, pp. 417, 419, 424-425)

**Alumni Motivations for Donating**

Campbell & Co. (2008) found that higher education levels correlate positively to giving and to increased giving as income rises (p.6). Among Gens X and Y, Education is ranked fifth among causes to which they donate (Harnett & Matan, 2014, p.5). “Education giving appears to be most frequent among people most likely to have school-aged or college-aged children. Among Millennials, 17.1 percent gave to education. In Generation X, 21.8 percent did” (Campbell & Co, p.19). The Chronicle of Higher Education reported on a 2015 study which indicated that trust in the educational institution is the most important factor in alumni’s decision to donate. The report quoted the study’s author, Mr. Drezner, associate professor of higher education at Columbia University, saying that ‘institutions are not doing a good job teaching their alumni and students how the finances work, how philanthropy works, where does the money go’ (Schmidt, 2015, p.1). This speaks to the importance for schools to educate alumni about philanthropy and funding needs, which may enhance their trust in the organization’s efficacy. In the case of Gens X and Y, we know that being transparent, demonstrating impact, and designing meaningful engagement opportunities are organizational principles that would help build their trust in and positive attitude toward their alma mater.

College alumni are shown to be motivated by reciprocity or getting something in return for their donation, as well as by feeling an affinity with the organization, care for current students, alumni duty or obligation, and the social status of belonging and the prestige of being affiliated with a top-ranked school. University students who were active in a group such as the Greek system, club or athletic team are more likely to have a positive attitude toward their alma mater, and the affinity often remains closely associated with their college experience. A student’s positive relationship with one or more faculty members also creates a stronger affinity for the

institution. Other scholars suggest field of study has more to do with the decision to and amount donated, regardless of income level. This might be attributable to trust or identity confirmation that grows out of shared experiences with faculty or classmates within the department. (Bekkers & Wiepking, 2007, pp.8-9; Meer & Rosen, 2007, pp.1-6; Stephensen & Bell, 2014, p.177-182)

**Self-identity with school.** Often a common bond and language develop from sharing a university experience with other students. Independent schools may benefit from conveying their brands and marketing using common language, images of beloved faculty, and traditions to remind alumni of their connection to the organization. Unfortunately for some, the feeling of affinity and shared identity can be lost as schools evolve and change. Stephensen & Bell (2014) explained that “when the image of the university and that of the self are incongruent, the individual no longer has a positive evaluation of the institution and loses preference for it as a recipient of financial support” (p.183).

**Multiple identities.** Unlike older generations, Gens X and Y might ally with multiple identities and affinity groups that potentially influence how and where they donate time and money. Schools could consider curating more than one point of connection for alumni to their alma mater and to other alumni. Engaged alumni are more likely to support the institution than those who are not actively participating in programs or volunteer boards. Involvement in school activities and involvement in alumni activities were found to be prime indicators of a greater likelihood of giving. The Independent Sector (2000) found that youth who are active volunteers become more generous adult donors. Many private schools and institutions of higher education have long since had service hours as part of their graduation requirements, meaning alumni are being taught about charitable needs and service at a young age. (Harnett & Matan, p.5; Sargeant & Woodliffe, p.289; Bekkers & Wiepking, pp.7-9,17)

*A case study of alumni giving.* Jonathan Meer and Harvey Rosen reported that self-interest accounted for 50% of the motivation for giving among college alumni whose charitable giving behavior they studied. The study focused on the role of reciprocity in giving and was measured by tracking giving on the ten year “child cycle,” which began with alumni who could have high school aged children, followed the times the children did or did not apply for admissions, and continued after the children were accepted or denied admission, and through four years of college and two post-graduation years. It compared patterns of giving among alumni with and without children. The giving pattern was clear. It rose during the time when youth and parents would have been thinking about colleges. Giving increased significantly upon acceptance to the university and dropped back to pre-child cycle giving within 6 years. For those alumni whose children did not plan to apply, giving generally went down and stayed on a gently downward-sloping trajectory. Lastly, for those whose children’s applications were denied, there was a dramatic drop in giving which ended and stayed at zero giving (Meer and Rosen, pp. 2-3). This illustration reminds us of the complexity of motivations that shape decisions to donate or to stop donating. It reminds us, as well, of fundraising challenges that are unique to private schools, colleges and universities.

### **Summary**

Attitude, subjective norm, perceived behavioral control, moral norm and past behavior have been empirically proven to increase intention to donate and/or predict future donative behavior. Gens X and Y’s values and characteristics inform much of how their collective attitudes, behavioral norms and perceived behavioral control have been shaped. This study, using an extended Theory of Planned Behavior sought to determine the influence of proven motivational factors of intention to donate on Gens X and Gen Y.

## Methods

The purpose of this study was to identify the key factors that motivate Generations X and Y alumni to make monetary donations to their independent school alma maters. The study was designed also to determine whether the motivating factors differ in their influence on Generations X and Y. The study design was based on Azjen's Theory of Planned Behavior and intended to measure the influence of 7 motivational factors on the dependent variable, intention to donate.

### Intention to Donate

Azjen (as cited by McSweeney & Smith, 2007, p.365) holds that intention is the proximal determinant of behavior, which in the case of this study, was the intention to donate. His theory has credibly demonstrated the significant role of attitude toward a behavior, perception of control over the behavior, and societal norms in motivating a person's intention to act. In previous studies, behavioral norms measured as a single construct proved to be the weakest of the three predictors of intention. For the current study, the researcher created questions to differentiate between four behavioral norms—approval from important others, perception that friends give, perception that alumni give, and moral beliefs—believing that Generation X would be more motivated by prestige/approval from others, and that Generation Y would be more motivated by what they believe others are doing. The researcher was also interested to test moral norm independently, since in other studies, it had proven to be a strong influence on intention to engage in pro-social behaviors such as volunteering and donating.

**Independent variables.** The independent variables of the current study were comprised of motivational factors that former studies had shown to be significantly correlated to intention to act. The 7 motivational factors as developed for this study were attitude, which refers to one's

attitude toward making a monetary donation; perceived behavioral control, which refers to the individual's perceived amount of control over the decision to donate; approval, which represents social approval, recognition, credibility and/or prestige gained from making a donation; friends give; and alumni give are two descriptive norms that represent perceptions of others' donative behavior; moral norm, which refers to one's personal sense of responsibility, duty and/or altruism; and past behavior, which pertains to past donative behavior. Additional questions were included in the survey but were not part of the study.

**Sampling and recruitment.** In choosing to increase our understanding of motivations to donate among independent school alumni born between 1965-1995, the researcher narrowed the population for study by focusing on three Virginia independent schools where she had an existing collegial relationship. The researcher conferred with the Schools' headmasters and development directors for permission to utilize their respective databases without compromising confidentiality or having personal access to alumni records. One school declined to participate. The other two schools (A and B) agreed to electronically disseminate the survey link to their living alumni who had graduated from the school and whose birth dates fell between 1965-1995. School A is an all-girls day school founded in 1890 that has approximately 1000 students and 5500 alumnae worldwide. School B is a coeducational institution founded in 1915 that has approximately 1700 students and more than 7000 alumni worldwide. School A emailed to 2033 alumnae and School B to 2321 for a combined sample of 4,354 individuals.

**Survey procedures.** The two independent schools sent an email invitation to the recipients to support graduate research about intentions to donate by Generations X and Y by completing and submitting the short online quantitative survey. The message included a link to the survey, which was anonymous and confidential; it did not include any implied requirement to



participate and no incentive was offered or provided to participants. The survey was open for 30 days, and most submissions were made within the first 12 days. The response time was consistent between both schools, even though one school sent a follow-up reminder about the survey.

**Sample.** There were 610 respondents, which equated to a 14% response rate; both schools had a greater than 10% response rate, and School A's rate was slightly higher than B's. Of those survey submissions, respondents who did not agree to the *Consent to Participate*, failed to complete most of the survey questions, or failed to select a birth year range were removed from the analysis, leaving a final sample of 504.

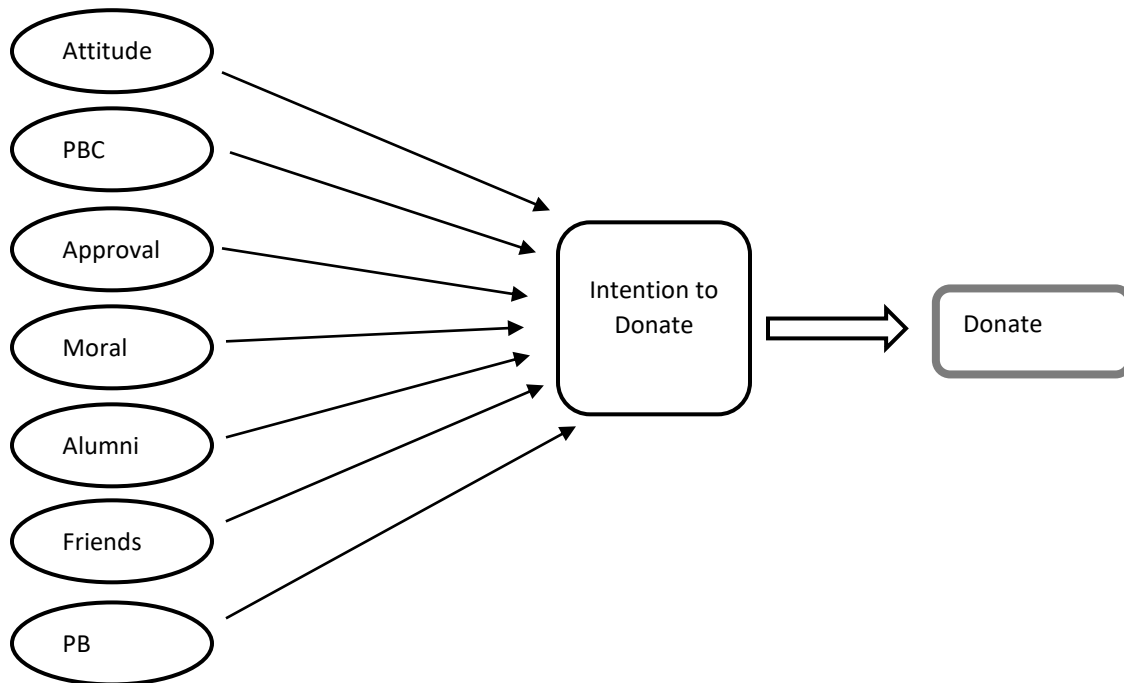
## Measures

The survey instrument was created using the University of Richmond's Qualtrics online survey platform. It was modeled on a survey conducted by Smith & McSweeney (2007). A survey draft was submitted to and approved by the University of Richmond's Institutional Review Board prior to its use. It was tested among a small number of alumni staff members from both independent schools and shared with two University of Richmond professors and two graduate school classmates. Their collective input led to several survey improvements from the removal of some questions that were repetitive, and better word choices, to re-ordering and re-scaling some questions and answers. It allowed the researcher to streamline the survey questions and improve the survey's overall readability. Practice survey response times were less than 5 minutes. The final survey was composed of 42 questions for School A and 41 questions for School B. School A had one additional question to identify whether the alumna had been a day or boarding student, and otherwise the surveys were identical. Most of the questions followed a 7-point Likert scale where higher scores indicated more positive responses i.e. *My making a monetary*

*donation to my high school in the next six months would be pleasant*; response #7 equated to *Strongly Agree*, where 7 was the most positive choice. (See Appendix A for Survey)

**Demographic variables.** The survey opened with the University of Richmond's *Consent to Participate* statement to which respondents were asked to agree. It was followed by seven demographic questions that included birth-year range, which was used to establish whether the respondent was a member of Generation X or Y, gender, race, religious belief, legacy status and a number range of years the respondent attended the school. It was designed to measure which of seven motivational factors predict intention to donate to one's alma mater, where the motivational factors were the independent variables, and intention to donate was the dependent variable. See Figure 1 for the study design, which adapted from Kashif, Hassan and Sarifuddin (2015, p.98)

**Figure 1**



**Independent variables and sample questions.** Attitude toward making a monetary donation to one's alma mater was measured using a 7-point Likert scale. The questions read: *My making a monetary donation to my high school in the next six months would be...* and was followed by 7 adjectives, such as *pleasant, satisfying, helpful, unnecessary*, each of which was treated as an individual question and set of answers. Answers for each question ranged from *Strongly Disagree, Disagree, Somewhat Disagree, Neither Disagree nor Agree, Somewhat Agree, Agree, Strongly Agree*.

Perceived behavioral control (PBC), or perception of one's control over donating to alma mater, was measured on five survey questions; four utilized a 7-point Likert scale and one utilized a percentage slide rule. For example, one question read: *It is mostly up to me whether I donate money to my high school within the next 6 months* and had answer choices ranging from *Definitely False, Probably False, Somewhat False, Neither True nor False, Somewhat True, Probably True and Definitely True*.

Various survey questions were structured to distinguish the influence of three behavioral norms classified as descriptive, subjective, and moral on intention to donate. Again, for clarification, descriptive norms refer to perceptions of what alumni and friends do relative to donating. Subjective norms refer to perceptions of others' opinions about donating with an emphasis on approval. Finally, moral norms refer to personal sense of duty, responsibility and care for others.

Perception of alumni giving was measured using a 7-point Likert scale on a single question: *How likely is it that alumni of your high school donate money to the school* had answer choices ranging from *Extremely Unlikely, Moderately Unlikely, Slightly Unlikely, Neither Likely nor Unlikely, Slightly Likely, Moderately Likely, Extremely Likely*. Perception that friends give

was measured on a percentage sliding scale with a single question as follows: *Think of your high school friends. What percentage of them do you believe donate money to their high school?*

Approval from others was measured on a 7-point Likert scale on a single question: *The people closest to me would approve if I donated money to my high school*, and the answer choices ranged from *Strongly Disagree*, *Disagree*, *Somewhat Disagree*, *Neither Disagree nor Agree*, *Somewhat Agree*, *Agree*, *Strongly Agree*.

Moral norms were measured on four questions utilizing a 7-point Likert scale. For example, *I am the kind of person who donates money to my high school*, and *I believe I have a moral obligation to donate money to my high school* had answer choices that ranged from *Strongly Disagree* to *Strongly Agree*.

Past giving behavior was measured with three questions, one of which utilized a 7-point Likert scale and two utilized an ordinal scale. For example, *since you graduated from high school, how often do you donate money to your high school* had numeric responses including *1. more than one time per year 2. once every year 3. once every couple of years 4. not for a long time 5. never*.

**Dependent variable and questions.** The dependent variable, intention to donate to one's alma mater, was measured on two questions that were placed at different locations in the survey. The two questions, formatted on a 7-point Likert scale, were: *I intend to donate money to my high school in the next six months*, and *I will donate money to my private high school in the next six months*. Seven answer choices ranged from *Strongly Disagree* to *Strongly Agree*.

**Additional questions unrelated to the Study.** The concluding survey questions were not part of the study but were of interest to the participating schools to inform their communications and assess younger generations' level of commitment to private education. Four questions

measured how younger generations view private education and rank the benefits they received from their education. Eight presumed benefits of a private education and one opportunity to write in a benefit were provided for top 5 ranking. The benefits included (1) teachers, (2) friendships, (3) academic challenge (4) exposure to opportunities, (5) character development (6) preparation for college and/or life, (7) sports, arts, other extracurricular, (8) sense of belonging. Three additional questions pertaining to charitable giving at large were included but were not part of the study.

## **Analysis and Findings**

The research study was designed to identify the motivational factors that most influence Generation X's and Y's intention to donate to their alma mater and how they may differ across the two generational groups.

### **Procedures for Analysis**

Once the study was closed, the data were downloaded to two excel files, one for each school. The data were cleaned and merged into a single document; the schools were denoted in a newly created variable. The researcher created a code sheet wherein a number was assigned to each possible answer to the survey questions so that numeric calculations and analysis could be conducted. For example, birth year range had a binary response of 1965-1980 or 1981-1995 where the first was assigned a code of 1 and the latter a code of 2. See Appendix B.

### **Reliability Testing**

Before conducting any analysis, four variables were created, which demonstrated acceptable reliability with a Cronbach Alpha score of higher than .70. These variables included intention to donate to alma mater ( $r=.968$ ), attitude ( $r=.922$ ), moral norm ( $r=.832$ ) and perceived behavioral control ( $r=.707$ ), which was z-scored because one item was on a 100-point scale. Past behavior, friends give, alumni give, and approval were each measured on a single question.

### **Analysis**

Our analyses proceeded in three stages: first we examined correlations between the variables (see Table 2), then we examined potential generational differences on all variables with *t*-test analyses, and finally we conducted moderation analyses to determine if the relationship between the motivational factors and intention to give differed across the two generations (see Figures 3, 4 and 5 on pp.30-31)

**Table 2: Correlation Table**

		Attitude	Control	Moral	Past Behavior	Approval	Friends Give	Alumni Give
intention	Pearsons	.769**	.377**	.775**	.789**	.516**	.329**	.083
	Correlation							
	Sig. (2-tailed)	.000	.000	.000	.000	.000	.000	.062
	N	503	504	504	502	501	499	504

**Correlations highlights:** Correlation analyses indicate whether the variables are related and whether the relationships are positive, negative or neutral. Correlations allow us to better predict behavior based on the strength of the relationship between the independent variables and the dependent variable. Table 2 reflects very strong, positive correlations between intention to give, and four of the independent variables including attitude, moral norm, past behavior and approval. This means that as attitude toward giving becomes more positive, intention to donate increases; the stronger the sense of personal responsibility or care for others, the stronger the intention to donate; the more frequent the past giving, the greater the intention to donate again; and the greater the interest in approval from others, the greater the intention to donate.

Other strong, positive correlations of note were between attitude and moral norm, attitude and past behavior, and attitude and approval. This finding raises questions about the relationship among these motivational factors. Since the reward of acting on one's personal responsibility, and the social approval gained by doing so both may generate *joy of giving*, and past behavior may be habit forming when the action generates positive feelings in the donor, a future study could explore whether causation exists among these motivational factors and attitude.

Past behavior correlated positively to perceptions that alumni give, which could stem from strong cultures of giving in independent schools where alumni giving is communicated, recognized, and expected. It also validates the market belief that gaining alumni donors soon after they graduate establishes a giving pattern that is more likely to lead to long-term and increased giving by alumni. Perceptions that alumni give and of having behavioral control were moderately, positively correlated to intention to donate, while perceptions of friends giving had weak correlation to intention. It may be that friends give was weak because the category of friends was already represented under the alumni category, and non-alumni friends would not be giving to the school.

***T-Tests for equality of means.*** To determine if there were generational differences in responses to the measures, we conducted independent samples *t*-Tests. Past behavior is stronger in Generation X than in Y ( $M=3.24$  v.  $M=3.00$ ) and is statistically significant at ( $t=@@$ ,  $p=.021$ ). This may be because Generation X has had a longer time to establish past behavior, or that Generation X is more inclined to charitable giving. Also, Generation X has a stronger intention to donate than Generation Y ( $M=4.81$  v.  $M=4.37$ ) and is statistically significant at ( $t=@@$ ,  $p=.016$ ), even though both generations reported strong intention to donate. This supports research findings that Generation Y places less value on donating money than on donating time and talents (citation). This generational difference could also be explained by age, time-distance from alma mater, degree of engagement, and/or other factors. The *t*-test analyses revealed that there was no significant difference by generation among the other independent variables of attitude, perceived behavioral control, approval, friends give, alumni give and moral norm.



**SPSS Macro Process for moderation analysis.** In order to determine if the link between motivational factors and intention to donate differed between the two generations, we conducted simple moderation analyses employing the SPSS Process Model 1 (Hayes, 2013), mean centering the variables and regressing intention to donate on generation, motivational factor, and their interaction.

Figure 3

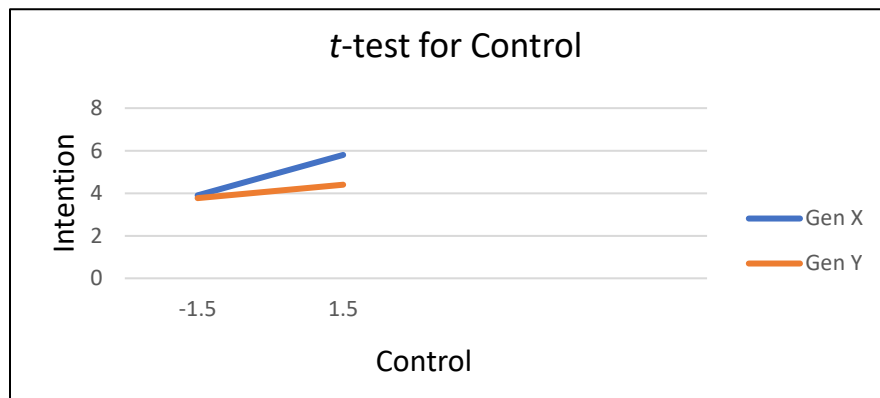


Figure 4

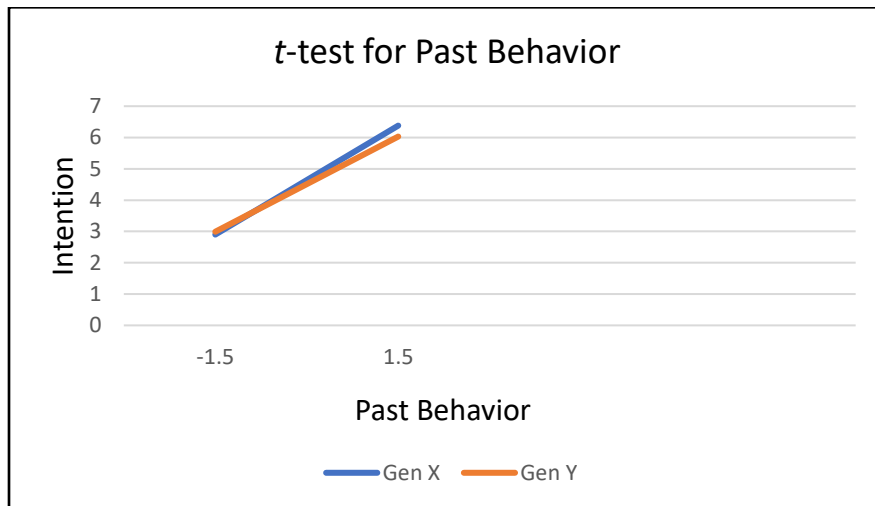
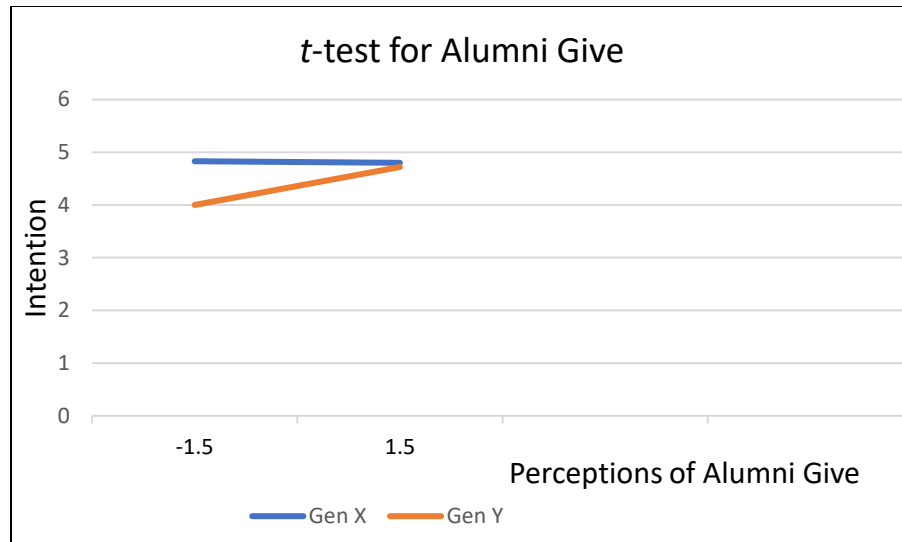


Figure 5



## Findings

We found that three of the variables—perceived behavioral control, perceptions that alumni give, and past behavior—were moderated by generation, which suggests that the degree of influence each factor has over intention to donate is moderated or affected by one’s generation. First, generation ( $p=.010$ ), perceived behavioral control ( $p>.001$ ) and their interaction ( $p=.023$ ) predicted intention to donate. More specifically, Generation X has greater intention to donate than Generation Y, greater levels of PBC predict greater intention to donate, and although PBC predicts intentions to give for all participants, it more strongly predicts intentions among those in Generation X.

Next, generation ( $p=.14$ ), perceptions that alumni give ( $p=.051$ ) and their interaction ( $p=.040$ ) predicted intention to donate. More specifically, Generation X has greater intention to

donate than Generation Y, and greater levels of perceptions that alumni give predict greater levels of intention to donate but this is only the case for those in Generation Y.

Finally, in this analysis with past behavior generation did not predict intention to donate ( $p=.265$ ), but both past behavior ( $p>.001$ ) and the interaction of generation and past behavior ( $p=.054$ ) predicted intention to donate. More specifically, although greater levels of past behavior predict intentions to donate for both generations, it more strongly predicts among those in Generation X.

**Other factor results.** Analyses of the other motivating factors revealed that the effect of a positive attitude towards giving, a strong moral sense of duty, an interest in approval from others, and perceptions that friends donate on intention to donate was equally strong for both generations. In summary, these new and important findings begin to isolate the motivational factors that influence and predict charitable giving among Generations X and Y.

The final survey question, which was not part of this study had respondents rank the top five benefits of their independent school experience. Sense of belonging was far and away the most significant benefit selected by most participants. Sports, arts and extra-curricular was the second most frequently selected benefit. Finally, academic challenge and character development respectively were very closely ranked but negligible relative to the top two benefits identified.

## **Discussion**

The goal of the present research was to delve into what motivates young alumni of independent schools to donate to their alma maters. Young alumni were categorized as members of Generation X (birth year between 1965-1980) and Generation Y, or Millennials, (birth year between 1981-1995). The study utilized an Extended Theory of Planned Behavior to attain its results, which supported past research and adds to the body of scholarship on the topic of younger generations and charitable giving. It also adds to pro-social behavior scholarship and predictive modelling.

The present study proposed to answer two research questions as follows: *Among Generations X and Y, what factors motivate intention to donate to one's alma mater? Does the influence of motivational factors change based on Generation?* The researcher made five hypotheses as follows: Hypothesis 1, Confirmation that attitude, PBC and injunctive norms will be strong determinants of intention to donate; Hypothesis 2, Moral normative beliefs will be a significant determinant of intention to donate; Hypothesis 3, Past behavior will predict intention to donate; Hypothesis 4, Approval will more strongly predict intention to donate in Generation X; and Descriptive norms—friends and alumni give— will more strongly predict intention to donate in Generation Y.

### **Contributions to the Theory of Planned Behavior**

This study extended TPB to more fully explore the factors that motivate Generations X and Y to donate to their alma mater. In addition to the Theory's primary determinants of intention and behavior— attitude, injunctive norms and perceived behavioral control—we added past behavior as well as differentiated among norms to isolate subjective, descriptive and moral norms' influence on intention. As expected, and noted in Hypothesis 1, attitude, PBC and injunctive

norms predicted intention to donate, in keeping with past research. Unlike Smith and McSweeney's research results, this study demonstrated the value of including descriptive norm; even though it wasn't strongly correlated to intention, perceptions that alumni give was found to predict increased giving in Gen Y. This may well apply only to independent school communities yet is a variable worthy of inclusion in research relative to other closed-membership organizations.

**Hypotheses 2-5.** As posited in Hypothesis 2, the moral component proved to be a significant predictor of intention to donate, which validates its inclusion in future research using the TPB to predict charitable giving and other pro-social behaviors. Hypothesis 3, the role of past behavior was shown to predict intention. Hypothesis 4, which posited that Gen X would be more influenced by approval than Gen Y was not supported by the findings. Approval was an equally strong predictor of intention to donate among Generations X and Y. Hypothesis 5 predicted that two descriptive norms would be stronger motivations of intention in Gen Y, one of which was validated by the study—perceptions that alumni give—and the other not.

TPB, with the additions of past behavior and moral norm, demonstrated its effectiveness as a predictive model for charitable giving. There are several opportunities for future research into the specific variables such as whether there is causation among the correlated variables, the role of alumni membership in motivating and predicting charitable giving and/or other pro-social behaviors, and to further explore the role of moral obligation in motivating pro-social behaviors in Gens X and Y.

### **Implications of Attitude, Moral Norm, Approval and PBC for Development Offices**

Whether an independent school, college or other type of nonprofit organization, these findings have implications for communications and fundraising strategies to secure and keep Gen X and

Gen Y donors. There are any number of steps a development office can take to foster a positive attitude among Gen X and Y such as to educate them about the funding model and the needs, provide networking and mentoring opportunities, involve them in problem-solving, consider diverse affinity opportunities and share imagery and stories that reflect their peers and values.

**Attitude and Trust.** A positive attitude stems partially from trust that the organization will use the donation effectively and as intended. Previous studies have indicated that Gens X and Y expect to see evidence of impact being achieved with donated funds. Transparent communications, hands-on involvement by alumni, and ensuring professional interactions are examples of steps schools can consider taking to meet Gen X and Y's expectations. Sargeant and Woodliffe, 2007, p.284) found that people orient their giving to beneficiaries and causes to which they can relate, which presents an opportunity for schools to reflect and nurture alumni identify confirmation with current students. Marketing research found that Gen Y gets their information from social media platforms, which suggests that not only do nonprofits need to stay fresh and current on social media platforms but also attend personally to creating hands-on opportunities to be helpful in solving problems or enabling significant achievements. Similarly, Gen X is more likely to have a positive attitude toward a school or charity if they can be part of meaningful discussion and have autonomy over their volunteer work.

**Moral norms.** The significant role of moral norm is not just affiliated with religiosity and should not be overlooked. In this study, 4/5 of the participants reported having some measure of religious belief and 1/5 reported having no religious belief. Among independent schools, where one of the two participating schools is episcopal, this ratio is not surprising. However, many participants who reported having no religious belief also had strong positive responses to at least two of the four moral questions. Schools and other nonprofits might want to

consider ways to encourage and reflect a compelling sense of duty and care for others in order to motivate younger generations to donate. Religious-based independent schools could explore ways to underscore the moral underpinnings and altruism that are woven through their academic programs. In reminding alumni of their moral connection to each other and future students, independent schools may be able to further the sense of belonging that more than 75% of alumni selected as the #1 benefit of their education.

It was informative to find that approval is a strong predictor of intention to donate among both generations. The rise of conspicuous giving, similar to conspicuous consumption (Green & Webb, 1997 as cited by Konrath & Handy, 2017, p.352) and multiple identity affinities in both generations, and especially in Gen Y, lend credence to their being motivated by the psychological benefits of approval; the sense of belonging, group membership, self-identity confirmation and acceptance are some of the psychological benefits that align with the value systems of Gens X and Y. Schools and nonprofits at large may want to consider developing approval and belonging strategies as part of the engagement, solicitation and relationship management of younger generations.

**Perceived behavioral control.** Finally, PBC is a strong determinant of intention to donate in both Gen X and Gen Y. Development offices could evaluate ways to simplify giving, making it convenient, timely and within alumni control to donate. This could involve mobile pay, auto credit card deduction, payroll deduction, a giving app and other payment vehicles that meet Gens X and Y when it suits them and where they are in their lives. Being transparent about how gifts are used and conveying the impact of all sizes of gifts may strengthen Gens X and Y alumni giving to their school by reinforcing their PBC.

### **The Role of Generation and Implications for Development Offices**

In this study, generation moderated perceived behavioral control, past behavior and perceptions of alumni giving, which can guide interventions toward increasing intention to donate among Gens X and Y. Partially in line with Hypothesis 5, results showed that Gen Y is more strongly influenced by alumni giving than Gen X, so marketing and communications offices might consider integrating more images and stories of Generation Y alumni giving. Results indicated that perceptions of friends giving was a not motivating factor. Fundraising plans may want to incorporate Gen Y peer-to-peer solicitations using social media. Forming or expanding on existing volunteer groups to include members of Gen Y and structuring their responsibilities in line with their desire to be mentored, solve problems and belong to a group may strengthen their perceived behavioral control, while contributing to a positive attitude toward alma mater and the habit of giving. A mentoring role would satisfy one of Gen X's qualities, while leveraging their influence on younger and older generations.

**Perceived behavioral control.** Perceived behavioral control is a strong determinant of intention to donate in both generations and is stronger in Gen X. It makes sense that PBC would be a stronger factor in the Generation characterized as fiscally conservative, pessimistic, independent, and cautious. This could also be attributable to their life-stage since their ages range from 32-54, which is when families tend to have children in the home and are building their net worth. While the largest number of major gifts still come from individuals aged 45-65, it is imperative to develop relationships with younger alumni who will be at the peak giving-age range over the next 20 years, and for many who will make major gifts before age 45 (Harnett & Matan, 2014, p.4).



**Past behavior.** The finding that past behavior predicts intention to donate supported Hypothesis 3. Higher levels of past behavior predict future giving by both generations but more strongly predict giving in Gen X. Schools may want to consider a strategy that focuses on securing Gen X donors by providing ways to work independently on behalf of the school, recognizing sustained giving, providing an accounting of how the funds were used, and allowing them to get directly involved in dialogue with the organization. Incorporating a strategy to capture Gen Y giving, such as a crowd-funding program within annual giving, is also important in order to establish the habit of giving. While this study did not explore why past behavior differs for Gen Y, one explanation may be that the younger population has had less time to establish a giving habit.

**Impact.** Both generations seek meaningful impact from their time and donations and expect timely, transparent communication by the nonprofit, so determining how the organization can represent these values when developing its communications and fundraising strategies is more likely to inspire giving. Annual funds generally start with small donations and are challenged to be able to show the direct impact of numerous small donations on the program. Restricted annual gifts limit the school's flexibility and generate more work for the staff without yielding a greater return. It may be worthwhile to reevaluate the construct of traditional annual giving programs and volunteer structures to incorporate visible impact and problem solving. 'The ways they want to engage with organizations are going to require nonprofits to rethink how they go about major-donor engagement, and it's not a small rethink,' according to Moody & Goldseker (DiMento, p.2). "These donors want to do things like serve on a nonprofit committee, help the charities they support develop new programs, and work with senior staff to plan strategy" (DiMento, p.2).

**Limitations**

The study was limited by a homogenous participant population from two independent schools. Ninety-nine percent of the respondents identified as Caucasian and none as African American. This raised questions about why African American alumni did not take the survey and opens the door for future researchers to consider a qualitative study to gather information on Gens X and Y African American's perceptions about surveys at large, and charitable giving, to help guide future studies. Another limitation was the intentionally small school selection for the sample; a broader representation of independent schools' alumni and/or a comparison of motivations and intention to donate to charity at large across the education spectrum would be informative. The current study was limited by not having a follow up study six months later to ascertain whether intention to donate resulted in actual donative behavior.

**Conclusion**

TPB proved to be a valid, useful construct to measure factors that predict intention to donate. Attitude, social and moral norms, and perceived behavioral control are all strong contributors to Generation X and Y's intention to make charitable donations to their independent school alma maters. Frequency of past giving also predicts intention to donate in both generations but is a stronger predictor among Generation X. Perceptions of alumni giving strongly increase Gen Y's intention to donate, while it is a neutral factor for Gen X. This research has applications for independent schools and private colleges and offers a new baseline for future research on generations and donative behavior, age v. generation as the moderating factor, gender and ethnic differences if any in generational motivations to donate, and larger studies of independent and private school graduates with regards to intention to donate to charity.

I pledge that I have neither received nor given unauthorized assistance during the completion of this work. Elizabeth Harvard, March 24, 2019

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## Appendix A

## Survey

## Motivational and Behavioral Survey 2018\_SCHOOL NAME

Start of Block: Block 8

**Q1.1 PARTICIPANT CONSENT FORM** **Consent Form** You are being asked to take part in a research study of generational differences in motivations for charitable giving. Details about this study are discussed below. It is important that you understand this information so that you can make an informed choice about being in this research study. If you have questions, please feel free to ask the researcher for more information. **Purpose** The purpose of this study is to learn more about the attitudes and beliefs that influence charitable intentions and behaviors. The study should take approximately 3-5 minutes to complete. If you agree to participate, you will be asked to complete the confidential survey. The survey has 8 short sections each with a topic related to attitudes, beliefs and behaviors. **Contact Information** This research is being conducted by Elizabeth Harvard. If you have any questions about the project, Elizabeth Harvard, Graduate Student, or Dr. Crystal Hoyt, Professor of Leadership Studies and Psychology, University of Richmond can be contacted at eharvard@richmond.edu and choyt@richmond.edu respectively. **Possible Risks** There is no more than minimal risk involved in participating in this study. That is, the risks for completing this study are no more than the risks experienced in daily life. If you do experience any discomfort during the study, remember you can stop at any time without any penalty. You may also choose not to answer particular questions that are asked in the study. **Possible Benefits** There are no direct benefits to you for participating in this project, but you may get some satisfaction from contributing to this investigation. **Confidentiality of Records** Reasonable steps will be taken to ensure that your individual results will remain confidential. However, as with any research process, the risk of a breach of confidentiality is always possible. Nevertheless, to the best of the investigators' abilities, your answers in this study will remain anonymous and confidential. **Use of Information and Data Collected** We will not tell anyone the answers you give us. Your responses will not be associated with you by name and the data you provide will be kept secure. What we find from this study may be presented at meetings or published in papers, but your name will not ever be used in these presentations or papers. **Protections and Rights** If you have any questions concerning your rights as a research participant, you may contact the Chair of the University of Richmond's Institutional Review Board (IRB) for the Protection of Human Subjects of Research at (804) 484-1565 or irb@richmond.edu for information or assistance. **Statement of Consent** The study has been described to me and I understand that my participation is voluntary and that I may discontinue my participation at any time without penalty. I understand that my responses will be treated confidentially and used only as described in this consent form. I understand that if I have any questions, I can pose them to the researcher. **By clicking the box below, I attest that I am 18 years of age or older, that I have read and understand the above information and that I consent to participate in this study.**

☐ Agree (1)

End of Block: Block 8

Start of Block: Demographic Information

Q2.1 I was born between

☐ 1965-1980 (1)

☐ 1981-1995 (2)

Q2.2 Were you a boarder

☐ Yes (1)

☐ No (2)

Q2.3 Please indicate your racial identification

☐ African American (1)

☐ American Indian (2)

☐ Asian (3)

☐ Caucasian (4)

☐ Latina/o (5)

☐ Other (6) \_\_\_\_\_

Q2.4 I am a person of religious faith

- ☐ Yes (1)
- ☐ No (2)
- ☐ Somewhat (3)

Q2.5 I have a family member(s) including parents, grandparents, siblings and/or children who attended, or attend now, my private high school

- ☐ Yes (1)
- ☐ No (2)

Q2.6 I attended the school I graduated high school from for

- ☐ 1-4 years (1)
- ☐ 5-8 years (2)
- ☐ 9-13 years (3)

Q2.7 My family received financial aid for me to attend my high school

- ☐ Yes (1)
- ☐ No (2)

End of Block: Demographic Information

Start of Block: Block 2 Attitudes toward Charitable Giving

Q3.1

Please indicate how much you agree or disagree with the following statements:

My making a monetary donation to my high school in the next 6 months would be ..

Q3.2 ...pleasant

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly Agree (7)

Q3.3 ...helpful

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

Q3.4 ...satisfying

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

Q3.5 ...positive

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

Q3.6 ...responsible

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

Q3.7 ...pointless

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

End of Block: Block 2 Attitudes toward Charitable Giving

Start of Block: Block 3 Perceptions of Behavioral Control

Q4.1 If I wanted to, I could easily donate money to my high school in the next 6 months

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

Q4.2 How much control do you have over whether you donate money to your high school in the next 6 months (express your answer as a percentage on slider)

0 10 20 30 40 50 60 70 80 90 100

None at all ()
----------------

Q4.3 It is mostly up to me whether I donate money to my high school in the next 6 months

- ☐ Definitely false (1)
- ☐ Probably false (2)
- ☐ Somewhat false (3)
- ☐ Neither true nor false (4)
- ☐ Somewhat true (5)



☐ Probably true (6)

☐ Definitely true (7)

Q4.4 I intend to donate money to my high school in the next 6 months

☐ Strongly disagree (1)

☐ Disagree (2)

☐ Somewhat disagree (3)

☐ Neither agree nor disagree (4)

☐ Somewhat agree (5)

☐ Agree (6)

☐ Strongly agree (7)

End of Block: Block 3 Perceptions of Behavioral Control

Start of Block: Block 4 Behavioral Norms

Q5.1 Think of the people who are important to you. What percentage of them do you think would approve of you making a monetary donation to your high school. (Slide rule to answer.)

0 10 20 30 40 50 60 70 80 90 100

Percentage ()
---------------

Q5.2 The people closest to me would approve if I donated money to my high school

☐ Strongly disagree (1)

☐ Disagree (2)

- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

Q5.3 Think of your high school friends. What percentage of them do you believe donate money to their high school

0 10 20 30 40 50 60 70 80 90 100

100% ( )
----------

Q5.4 How likely is it that alumni/ae of your high school donate money to the school

- ☐ Extremely unlikely (1)
- ☐ Moderately unlikely (2)
- ☐ Slightly unlikely (3)
- ☐ Neither likely nor unlikely (4)
- ☐ Slightly likely (5)
- ☐ Moderately likely (6)
- ☐ Extremely likely (7)

End of Block: Block 4 Behavioral Norms

Start of Block: Block 5 Injunctive Norms

Q6.1 I am the kind of person who donates money to my high school

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

Q6.2 I would feel guilty if I did not donate money to my high school

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

Q6.3 I believe I have a moral obligation to donate money to my high school

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

Q6.4 Donating money to my high school goes against my principles

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

End of Block: Block 5 Injunctive Norms

Start of Block: Block 6 Past Behavior and Intentions

Q7.1 I do not donate money to my high school

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

Q7.2 In calendar year 2017, I donated money to my high school

- ☐ Yes (1)
- ☐ No (2)
- ☐ Don't know (3)

Q7.4 Since you graduated from high school, how often do you donate money to your high school

- ☐ More than once per year (1)
- ☐ Once every year (2)
- ☐ Once every couple of years (3)

- ☐ Not for a long time (4)
- ☐ Never (5)

Q7.5 I will donate money to my private high school in the next 6 months

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

End of Block: Block 6 Past Behavior and Intentions

Start of Block: Block 7 Motivation toward Charities at Large

Q8.1 This group of questions pertain to charities in general

Q8.2 How likely do you think it is that you will donate money to one or more charities in the next 6 months

- ☐ Extremely unlikely (1)
- ☐ Moderately unlikely (2)
- ☐ Slightly unlikely (3)

- ☐ Neither likely nor unlikely (4)
- ☐ Slightly likely (5)
- ☐ Moderately likely (6)
- ☐ Extremely likely (7)

Q8.3 How many monetary donations have you made to one or more charities during the past 6 months

- ☐ 0 (1)
- ☐ 1-3 (2)
- ☐ 4+ (3)

Q8.4 I do not intend to donate money to any charities in the next 6 months

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

Q8.5 Think of the people closest to you. What percentage of them do you think donate money to charities

0 10 20 30 40 50 60 70 80 90 100

Percentage ()	
---------------	--

Q8.6 Most people who are important to me donate money to charities

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)
- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

Q8.7 I am the kind of person who donates money to charities

- ☐ Strongly disagree (1)
- ☐ Disagree (2)
- ☐ Somewhat disagree (3)



- ☐ Neither agree nor disagree (4)
- ☐ Somewhat agree (5)
- ☐ Agree (6)
- ☐ Strongly agree (7)

End of Block: Block 7 Motivation toward Charities at Large

Start of Block: Block 8

Q9.1 How important is it to you to support private education

- ☐ Extremely unimportant (1)
- ☐ Very unimportant (2)
- ☐ Somewhat unimportant (3)
- ☐ Neither important or not important (4)
- ☐ Somewhat important (5)
- ☐ Very Important (6)
- ☐ Extremely important (7)

Q9.2 How likely are you to recommend private education to your friends or neighbors

- ☐ Extremely unlikely (1)
- ☐ Moderately unlikely (2)
- ☐ Slightly unlikely (3)

- ☐ Neither likely nor unlikely (4)
- ☐ Slightly likely (5)
- ☐ Moderately likely (6)
- ☐ Extremely likely (7)

Q9.3 Please check the top 5 personal benefits of your private education experience

- ☐ Teachers (1)
- ☐ Friendships (2)
- ☐ Exposure to opportunities (3)
- ☐ Academic challenge (4)
- ☐ Character development (5)
- ☐ Sports, arts, other extracurricular (6)
- ☐ Sense of belonging (7)
- ☐ Preparation for college and/or life (8)
- ☐ Other (9) \_\_\_\_\_

End of Block: Block 8

Appendix B  
Sample Code Sheet

Q1 Consent	unanswered Negates Their Responses
Demographic Q2.1-Q2.7	
Q2.1 Generation	1965-1980=1 If no response to this question, negates survey responses 1981-1995=2
Q46 Gender	Male=1 Female=2
Q2.3 Race	African American=1 American Indian=2 Asian=3 Caucasian=4 Latina/o=5 Other=6 and has a write in
Q2.4 Religious	Yes=1 No=2 Somewhat=3
Q2.5 Legacy	Yes=1 No=2
Q2.6 Years ATTD	1-4 years=1 5-8 years=2 9-13 years=3
Q2.7 Financial Aid	Yes=1 No=2
ATTITUDE	
Q3.2 Pleasant	Strongly disagree=1 Disagree=2 Somewhat disagree=3 Neither agree or disagree=4 Somewhat agree=5 Agree=6 Strongly agree=7

Q3.3 Good	Strongly disagree=1 Disagree=2 Somewhat disagree=3 Neither agree or disagree=4 Somewhat agree=5 Agree=6 Strongly agree=7
Q47 Difficult	Strongly disagree=1 Disagree=2 Somewhat disagree=3 Neither agree or disagree=4 Somewhat agree=5 Agree=6 Strongly agree=7
Q3.4 Satisfying	Strongly disagree=1 Disagree=2 Somewhat disagree=3 Neither agree or disagree=4 Somewhat agree=5 Agree=6 Strongly agree=7
Q3.5 Helpful	Strongly disagree=1 Disagree=2 Somewhat disagree=3 Neither agree or disagree=4 Somewhat agree=5 Agree=6 Strongly agree=7
Q3.6 Empowering	Strongly disagree=1 Disagree=2 Somewhat disagree=3 Neither agree or disagree=4 Somewhat agree=5 Agree=6 Strongly agree=7

Q48 Unnecessary      Strongly disagree=1  
                                  Disagree=2  
                                  Somewhat disagree=3  
                                  Neither agree or disagree=4  
                                  Somewhat agree=5  
                                  Agree=6  
                                  Strongly agree=7

PERCEIVED BEHAVIORAL CONTROL (PBC)

Q4.1 Easy to donate      Strongly disagree=1  
                                  Disagree=2  
                                  Somewhat disagree=3  
                                  Neither agree or disagree=4  
                                  Somewhat agree=5  
                                  Agree=6  
                                  Strongly agree=7

Q4.2 % Control      Scale

Q4.3 Up to me      Definitely False=1  
                                  Probably False=2  
                                  Somewhat False=3  
                                  Neither true nor false=4  
                                  Somewhat True=5  
                                  Probably True=6  
                                  Definetly True=7

Q4.4 Intention HS      Strongly disagree=1  
                                  Disagree=2  
                                  Somewhat disagree=3  
                                  Neither agree or disagree=4  
                                  Somewhat agree=5  
                                  Agree=6  
                                  Strongly agree=7

BEHAVIORAL NORMS

Q5.2 Subjective HS      Strongly disagree=1  
 (Family approval)      Disagree=2  
                                  Somewhat disagree=3  
                                  Neither agree or disagree=4  
                                  Somewhat agree=5  
                                  Agree=6  
                                  Strongly agree=7

Q5.3 Descriptive HS Scale  
(Friends donate)

Q5.4 Descriptive HS  
(Alumni donate HS)

Extremely Unlikely=1
Moderately Unlikely=2
Slightly Unlikely=3
Neither likely nor unlikely=4
Slightly Likely=5
Moderately Likely=6
Extremely Likely=7

# MORAL NORMS

Q6.1 self-image

Strongly disagree=1
Disagree=2
Somewhat disagree=3
Neither agree or disagree=4
Somewhat agree=5
Agree=6
Strongly agree=7

Q6.2 Guilt

Strongly disagree=1
Disagree=2
Somewhat disagree=3
Neither agree or disagree=4
Somewhat agree=5
Agree=6
Strongly agree=7

Q6.3 Obligation

Strongly disagree=1
Disagree=2
Somewhat disagree=3
Neither agree or disagree=4
Somewhat agree=5
Agree=6
Strongly agree=7

Q6.4 Against Principles

Strongly disagree=1
Disagree=2
Somewhat disagree=3
Neither agree or disagree=4
Somewhat agree=5
Agree=6
Strongly agree=7

PAST BEHAVIOR AND INTENTIONS

Q7.1 Do not donate    Strongly disagree=1  
                              Disagree=2  
                              Somewhat disagree=3  
                              Neither agree or disagree=4  
                              Somewhat agree=5  
                              Agree=6  
                              Strongly agree=7

Q7.2 Last year HS    Yes=1  
                              No=2  
                              Don't Know=3

Q7.4 Frequency HS    More than once per year=1  
                              Once every year=2  
                              Once every couple of years=3  
                              Not for a long time=4  
                              Never=5

Q7.5 Intention HS    Strongly disagree=1  
                              Disagree=2  
                              Somewhat disagree=3  
                              Neither agree or disagree=4  
                              Somewhat agree=5  
                              Agree=6  
                              Strongly agree=7

PAST BEHAVIOR, INTENTION and NORMS CHARITIES AT LARGE

Q8.2 Intention    Extremely Unlikely=1  
                              Moderately Unlikely=2  
                              Slightly Unlikely=3  
                              Neither likely nor unlikely=4  
                              Slightly Likely=5  
                              Moderately Likely=6  
                              Extremely Likely=7

Q8.3 PB Quantity    0=0  
                              1-3=1  
                              4+=2

Q8.4 No Intention      Strongly disagree=1  
                                  Disagree=2  
                                  Somewhat disagree=3  
                                  Neither agree or disagree=4  
                                  Somewhat agree=5  
                                  Agree=6  
                                  Strongly agree=7

Q8.5 Subjective  
 % of people closest

Scale

Q8.7 Moral              Strongly disagree=1  
                                  Disagree=2  
                                  Somewhat disagree=3  
                                  Neither agree or disagree=4  
                                  Somewhat agree=5  
                                  Agree=6  
                                  Strongly agree=7

#### GENERAL QUESTIONS

Q9.1 Attitude t/w PS    Extremely Unimportant=1  
                                  Very Unimportant=2  
                                  Somewhat Unimportant=3  
                                  Neither important nor unimportant=4  
                                  Somewhat Important=5  
                                  Very Important=6  
                                  Extremely Important=7

Q44 Funds              Yes=1  
                                  Not Exactly=2  
                                  No=3

Q9.2 Recommend PS    Extremely Unlikely=1  
                                  Moderately Unlikely=2  
                                  Slightly Unlikely=3  
                                  Neither likely nor unlikely=4  
                                  Slightly Likely=5  
                                  Moderately Likely=6  
                                  Extremely Likely=7



Q9.3 Top 5 Benefits of your PS exp.

Teachers=1
Friendships=2
Exposure to Opportunities=3
Academic Challenge=4
Character Development=5
Sports, arts, other extracurricular=6
Sense of Belonging=7
Preparation for College and/or Life=8
Other=9 and is a write-in